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World Production and Trade

United States
Department of
Agriculture

Foreign
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Service

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Weekly
Roundup

WR 10-84

March 7, 1984

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

Hot dry weather in SOUTH AFRICA and ZIMBABWE has significantly reduced the production outlook for corn to be harvested in May-June of this year. The U.S. agricultural counselor in Pretoria estimates 1984 corn production in South Africa at 5.0 million tons, up 28 percent from the drought-reduced 1983 crop, but 66 percent below the record crop of 14.6 million harvested in 1981. The 1984 corn crop in Zimbabwe is estimated at 1.0 million tons, about the same as last year's drought-affected crop, but 67 percent below the record crop harvested in 1981. Little opportunity exists for any improvement in the yield outlook for corn in South Africa and Zimbabwe as most of the crop is past the moisture-sensitive grain filling period.

South Africa and Zimbabwe have traditionally exported corn. These drought-devastated crops, however, combined with depleted stocks, are expected to result in record corn imports by both countries. South Africa had imported about 2 million tons of corn to supplement last season's drought-reduced output, despite large stocks and virtually no exports. Zimbabwe, on the other hand, was able to cut exports, drew upon stocks and avoided large imports last season. This year, South Africa may require as much as 3-4 million tons of corn imports and Zimbabwe may need about 600,000 tons.

The U.S. agricultural counselor in Paris estimates FRANCE's total grain production in 1983/84 at 46.4 million tons, down 5 percent from last year's record harvest. Wheat production is estimated at 24.8 million tons, down 2 percent from the record 1982/83 crop. Barley production is estimated at 8.9 million tons, down 12 percent from last year's harvest. Corn production is estimated at 10.1 million tons, down 2 percent from 1982/83. Other grains including oats, rye, millet, mixed grains and rice (rough basis) are estimated at 2.6 million tons, about the same as a year ago.

The U.S. agricultural counselor forecasts 1984/85 total grain production at 49.8 million tons, up 7 percent from the 1983/84 harvest, and 2 percent above the previous record of 1982/83. Wheat production in 1984/85 is forecast at a record 25.9 million tons, up 4 percent from 1983/84 and an increase of 2 percent from the record 1982/83 crop. Wheat area in 1984/85 is estimated at 5.0 million hectares, an increase of 4 percent from 1983/84.

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OILSEEDS AND PRODUCTS

In light of the current price advantage soybean oil has over palm oil, the U.S. agricultural counselor in New Delhi believes that INDIA's October-September 1983/84 soybean oil imports will exceed the 1982/83 level of 400,000 tons. Despite record oilseed production, domestic vegetable oil prices have not declined. The State Trading Corporation has already started purchasing larger quantities of vegetable oils in the world market to temper the high domestic price levels. India has indicated that vegetable oil imports during November 1983-October 1984 could total 1.8 million tons. Total 1983/84 vegetable oil imports are now estimated at 1.5 million tons by the agricultural counselor.

KENYA's Ministry of Finance and Economic Planning announced a suspension of import duties on crude soybean oil and tallow imported as raw materials for local manufacturers of refined edible oils, soaps and related products. Kenya will reimburse importers for the 40-percent import duty from February 17 until June 30, 1984. Consequently, no duty will be paid during this period. This will make soybean oil more competitive with Malaysian palm oil and European tallow. The level of vegetable oil imports is historically around 100,000 tons, most of which is palm oil. The suspension is temporary, but there is an established precedent for an extension.

SOUTH AFRICA's 1983/84 oilseed production forecast has been decreased from 950,000 to 449,000 tons as drought conditions reduced yields according to the U.S. agricultural counselor in Pretoria. This is the third year in a row oilseed production has been affected by a drought. Peanut production is forecast at 79,000 tons, about the same as last year's weather-reduced crop, but 74 percent below the last nondrought harvest in 1980/81. Sunflowerseed output is estimated at 225,000 tons, 10 percent above the 1982/83 crop, but 56 percent below 1980/81 record harvest of 517,000 tons.

DAIRY, LIVESTOCK AND POULTRY

Meat production in SELECTED COUNTRIES during 1983 totaled 105.3 million tons, just over 1 percent above 1982. Gains were realized in pork and poultry, while beef production declined slightly. Pork output increased 3 percent due primarily to increases in the United States, the European Community (EC) and the USSR. Poultry output increased 1 percent, reflecting growth in the United States, USSR and Japan. For the third consecutive year, slow demand growth limited opportunities for profitable expansion in beef production. Current forecasts indicate that in 1984, growth in meat production again will be small as limited gains in consumer incomes in many countries keep the demand for meat generally weak. High feed costs also are constraining production.

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Meat Production in Selected Countries

	1982	1983	Forecast 1984
	-----Million Tons-----		
Beef and veal	40.7	40.6	40.7
Pork	36.3	37.3	37.7
Sheep and goat meat	4.6	4.7	4.7
Total red meat	81.6	82.6	83.1
Poultry meat	22.4	22.7	23.1
Total meat	104.0	105.3	106.2

World beef production declined slightly during 1983 as cattle inventories increased. In 1984, beef and veal production is forecast to be up slightly as animal inventories also expand. Herd rebuilding in Australia is expected to begin during the year but at a relatively slow pace as producers assess the relative profitability of beef compared to alternative enterprises (sheep and crops). In the EC, beef production and cattle inventories increased during 1983, largely the result of expanding dairy cow numbers. Slower growth in EC inventory expansion is projected in 1984 as a result of expected passage of more restrictive EC dairy regulations which could result in higher cow slaughter.

Cattle and Buffalo Numbers and Beef Production

	Beginning Cattle Inventory			Beef and Veal Production		
	1982	1983	1984	1982	1983	1984
	----Million Head----			-----Million Tons-----		
United States	115.6	115.2	114.0	10.43	10.74	10.50
Canada	12.1	11.6	11.1	1.03	1.05	1.03
EC-10	77.9	78.8	79.4	6.60	6.83	6.94
Eastern Europe	37.8	37.3	37.6	2.50	2.31	2.32
Soviet Union	115.9	117.2	119.4	6.62	6.80	7.10
Argentina	57.9	58.9	60.3	2.58	2.32	2.40
Uruguay	10.9	10.3	9.4	0.38	0.42	0.37
Australia	24.6	22.5	21.7	1.68	1.40	1.32
New Zealand	8.0	7.9	7.7	0.52	0.52	0.47
Japan	4.5	4.6	4.7	0.48	0.49	0.50
Total of 50 countries	944.1	941.7	943.6	40.67	40.59	40.74

Beef production in the Soviet Union is projected to increase again in 1984 as a result of continued improvement in feed supplies and expected heavier weight of slaughter animals.

In South Africa, drought again is a problem in most grazing areas. The forced reduction in cattle numbers has caused a falling of cattle prices that will lead to continuing heavy slaughter in 1984.

World pork production increased 3 percent during 1983, but a much smaller increase is projected in 1984. Most of the increase in 1984 is expected in the first half of the year because of current over production in many countries.

Hog Numbers and Pork Production

	Beginning Hog Inventory			Pork Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head-----			-----Million Tons-----		
United States	58.7	53.9	55.8	6.45	6.88	6.73
Canada	10.0	9.9	10.1	0.83	0.88	0.89
Mexico	16.5	16.0	14.0	1.20	1.08	1.07
EC-10	78.9	79.2	78.5	9.42	9.69	9.75
Eastern Europe	72.3	70.5	70.2	6.50	6.43	6.36
Japan	10.0	10.3	10.7	1.43	1.43	1.46
Soviet Union	73.3	76.7	78.5	5.27	5.50	5.90
Brazil	33.5	33.5	33.0	0.97	0.95	0.94
Total of 36 countries	401.8	401.8	406.0	36.28	37.28	37.68

EC pork production was up 3 percent in 1983. Only a 1-percent increase is projected for 1984 because of increasing feed costs and lower hog prices. EC hog inventories, which declined during 1983, are projected to continue downward in 1984. Danish hog numbers are expected to increase more than 5 percent, but this will be countered by herd reductions in West Germany, France and Ireland.

In Eastern Europe, feed shortages in Poland and Yugoslavia have resulted in reductions in pork production and animal inventories. While some measures have been taken to improve the situation in Poland, production of pork is not expected to increase during 1984. In the Soviet Union, increased beginning year inventories of almost 2 million hogs should result in sharply higher pork output in 1984.

In Korea, over production in 1983 has caused a sharp drop in hog prices. High level beginning year inventories are expected to decline in 1984, bringing a further increase in pork output.

In the Philippines, Taiwan and Venezuela, hog inventories are expected to fall in 1984 because of depressed economic conditions and higher feed costs.

Australia's sheep inventory recovery began in 1983 following the drought-induced reduction in 1982. By March 1985, Australian sheep numbers are expected to be just short of the 1982 level. Sheep, to some degree, have replaced beef cattle because of greater financial attractiveness. In New Zealand, sheep numbers are expected to expand in 1984 because of improved weather conditions in all grazing areas. New Zealand's sheep meat production in 1984 is projected to decline. The exceptionally large 1983 lamb crop is not expected to reoccur in 1984.

Sheep Numbers and Meat Production

	Beginning Sheep Inventory			Sheep and Goat Meat Production		
	1982	1983	1984	1982	1983	1984
	-----Million Head----			----Thousand Tons----		
Soviet Union	142.4	142.2	144.8	816	900	950
Australia	138.0	133.2	134.5	557	450	495
New Zealand	69.9	70.3	69.8	625	681	654
Total of 29 countries	664.7	657.2	660.5	4,582	4,654	4,757

Growth in poultry meat production in SELECTED COUNTRIES during 1983 was just over 1 percent as sluggish demand and higher feed costs combined to limit expansion incentives. Expected economic expansion in more countries during 1984 should result in improved demand for poultry meat and some increase in production. Current forecasts place 1984 poultry meat production at 23.1 million tons, almost 2 percent above 1983.

Poultry Meat and Egg Production

	Total Poultry Meat			Eggs		
	1982	1983	1984	1982	1983	1984
	---Thousand Tons----			---Billion Units----		
United States	7,046	7,232	7,295	69.6	67.9	66.5
Brazil	1,591	1,580	1,590	10.2	9.0	9.0
EC-10	4,368	4,259	4,347	72.2	70.3	69.8
Spain	853	810	825	12.4	12.3	12.4
Soviet Union	2,425	2,600	2,700	72.4	74.7	78.0
Total 1/	22,184	22,479	22,844	345.5	344.2	345.9
Mideast 2/	205	229	252			

Total of 42 countries 22,389 22,708 23,096

1/ Total includes 36 countries for meat and 35 countries for eggs. 2/ Total of Iraq, Kuwait, Saudi Arabia, Syria, United Arab Emirates and North Yemen.

World egg production in 1983 declined slightly from 1982. A 2.3-billion-egg increase in the USSR and small increases in other countries were offset by declines in the United States, Brazil, Spain and the EC. In the United States, poor returns in 1982 and most of 1983 caused producers to reduce layer numbers, which should result in another decline in egg production this year. A decline also is expected in the EC because of reduced export prospects. With plentiful feed supplies, the USSR is expected to realize another large increase in egg production during 1984.

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World broiler production, estimated at 15.3 million tons in 1983, was less than 1 percent above 1982 and only 2 percent above 1981. Poor returns constrained production in the United States. In Brazil, production remained at the 1982 level as exports and domestic demand failed to expand. EC broiler production was down nearly 5 percent as high stocks and slow exports kept producer prices low. France, West Germany and the Netherlands all had sharp production declines. Broiler production in Spain was down again in 1983 as weak demand and high feed prices kept profit margins extremely tight. In Mexico, production was down over 10 percent as producers adjusted to tight feed supplies and limited domestic demand.

During 1984 broiler production is forecast to expand over 2 percent. U.S. production, although expected lower during the first half of the year, should expand after mid-year. In Brazil, production is not projected to increase unless exports expand faster than currently anticipated. EC broiler production is projected upward as subsidies continue to facilitate exports.

Turkey meat production in selected countries was reported at 2.2 million tons in 1983, nearly 4 percent above 1982. U.S. production is projected up slightly in 1984 as U.S. producers respond to improved profit margins. EC production should increase by a small amount.

Broiler and Turkey Meat Production

	Broiler			Turkey Meat		
	1982	1983	1984	1982	1983	1984
	---Thousand Tons----			---Thousand Tons----		
United States	5,523	5,690	5,762	1,144	1,195	1,211
Brazil	1,500	1,490	1,500	NA	NA	NA
EC-10	3,018	2,880	2,972	687	713	721
Spain	785	745	760	20	20	20
Soviet Union	675	725	775	47	49	50
Total 1/	15,202	15,279	15,628	2,117	2,199	2,214

1/ Total includes 29 countries for broilers and 19 countries for turkey meat.

COTTON AND FIBERS

In FRANCE, cotton traders reportedly will rely less on the Soviet Union for future cotton supplies. Traditionally, the USSR provides about 50 percent of the cotton required by French textile mills. However, for the past several years Soviet cotton exports have been severely reduced. To ensure access to adequate supplies traders have had to seek alternative sources.

SOVIET/JAPANESE cotton trade has been sharply reduced in 1984. The USSR has agreed to supply about 30,000 bales to Japan for April-June delivery. During the same period in 1983, the Soviets shipped over 90,000 bales to Japan. It now appears that Soviet cotton exports to Japan for the 1983/84 season may total less than 100,000 bales, compared with previous years' exports of more than 300,000 bales.

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According to the U.S. agricultural attache in Lagos, NIGERIA's 1983/84 cotton crop has been reduced by drought to 75,000 bales, 17 percent below the crop of a year ago. Poor seed varieties and shifts to food crops also have continued to restrict output. Despite the reduced outturn, quality is reportedly good.

The U.S. agricultural attache in Islamabad estimates PAKISTAN's 1983/84 cotton crop at 2.1 million bales, 43 percent below the crop of a year ago and the smallest outturn since 1978. This year's crop was plagued by adverse weather and heavy pest infestation.

TOBACCO

In ZIMBABWE, the Tobacco Marketing Board set this year's flue-cured tobacco production target at 110,000 tons, up about 17 percent from 1983 output. With area planted to flue-cured tobacco estimated at 50,934 hectares, growers will have to achieve yields of 2.16 tons per hectare to meet the production target. Last season's flue-cured area totaled 46,234 hectares and yields averaged 2.04 tons per hectare.

The bulk of Zimbabwe's tobacco crop normally is planted in November and December and harvested from January through March. Despite below-normal rainfall that delayed planting and caused some regional crop failures, this season's flue-cured crop is showing excellent potential. Tobacco quality also is expected to be improved from last year.

TURKEY's total 1983 tobacco crop has been revised upward to 226,000 tons, a 2.5-percent increase from the previous estimate and 7 percent above 1982 output. The 1983 production gain was primarily due to increased output in the Aegean region, where the crop totaled about 145,000 tons, up 10 percent from 1982 output. Field preparations for planting of the 1984 crop are just beginning. Almost all of Turkey's tobacco crop is of oriental tobacco; a minor amount of flue-cured tobacco also is produced.

The Aegean grower's tobacco market for the 1983 crop officially opened Feb. 14, 1984. Virtually all of the output was sold within a few days at prices ranging between TL60 (US\$.19) and TL1095 (US\$3.50) per kilogram.

The ceiling support price for 1984 crop tobacco was increased by the Ministry of Customs and Treasury from last year's level of TL 335 to TL465 (US\$1.49) per kilogram. Premarket purchases by private merchants at prices well above the official ceiling pushed the overall average producer price in 1983 to around TL470 (US\$1.50) per kilogram.

The State Monopoly is estimated to have purchased about 75,000 tons of tobacco at an average of roughly TL350 (US\$1.12) per kilogram, while merchants are estimated to have purchased about 55,000 tons at an average price of TL700 (US\$2.24). Purchases are expected to continue for several more weeks.

AUSTRALIA's 1984 citrus crop is expected to total about 516,000 tons, up 9 percent from the 1983 harvest, according to the U.S. agricultural counselor in Canberra. The bulk of Australia's citrus harvest normally begins in April and runs through the end of the year. The 1983 harvest was at a six-year low due to the residual affects of a 1982 freeze and hot, dry conditions at flowering time.

Orange production in 1984 is forecast at 420,000 tons, up 10 percent from the previous season. Most of the increase in production is due to an expected 35,000-ton increase in the Valencia crop, as bearing area is up and yields are expected to be improved. The 1984 navel orange and lemon harvests also are projected to be up over last season. The tangerine and grapefruit crops, however, are expected to be slightly below 1983 levels.

U.S. TRADE BALANCE

U.S. agricultural exports during January 1984 rose 14 percent above the same month a year earlier to \$3.5 billion, with nonagricultural and total exports up 3 and 5 percent, respectively. U.S. agricultural exports during January 1984 contributed about half the value of the increase in total U.S. exports during the month (compared to January 1983). U.S. agricultural exports during the first third of fiscal 1984 increased 15 percent from the same period a year earlier, with nonagricultural and total exports rising 2 and 4 percent, respectively. The U.S. total trade deficit continued to worsen in January 1984, although U.S. agricultural trade contributed nearly a \$1.9 billion surplus for the month.

U.S. Total and Agricultural Trade January and October-January

	JANUARY 1983	JANUARY 1984	OCTOBER - JANUARY 10-82/1-83	OCTOBER - JANUARY 10-83/1-84
				(Million Dollars)
IMPORTS:				
Nonagricultural	18,525.9	24,579.8	73,288.7	90,014.1
Agricultural	1,494.9	1,694.0	5,439.6	5,937.8
TOTAL	20,020.8	26,273.8	78,728.3	95,951.9
EXPORTS:				
Nonagricultural	12,703.6	13,140.1	52,374.8	53,309.5
Agricultural	3,115.2	3,546.5	11,939.8	13,700.7
TOTAL	15,818.8	16,686.6	64,314.6	67,010.2
TRADE BALANCE:				
Nonagricultural	-5,822.3	-11,439.7	-20,913.9	-36,704.6
Agricultural	+1,620.3	+1,852.5	+6,500.2	+7,762.9
TOTAL	-4,202.0	-9,587.2	-14,413.7	-28,941.7

Selected International Prices

Item	: March 6, 1984	: Change from	: A year
	:	: previous week	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			\$ per MT
Canadian No. 1 CWS-13.5%12/	195.00	5.30	+2.00
U.S. No. 2 DNS/NS: 14%.12/	193.75	5.25	+1.25
U.S. No. 2 S.R.W.....	158.00	4.30	+6.00
U.S. No. 3 H.A.D.12/.....	191.00	5.20	+3.00
Canadian No. 1 A: Durum.12/	202.00	5.50	+2.00
Feed grains:			
U.S. No. 3 Yellow Corn....	157.00	4.00	+5.00
Soybeans and meal:			
U.S. No. 2 Yellow.....	311.25	8.45	+11.35
Brazil 47/48% SoyaPellets 4/	248.00	--	+11.00
U.S. 44% Soybean Meal.....	232.00	--	+10.50
U.S. FARM PRICES 5/			
Wheat.....	124.92	3.40	+4.04
Barley.....	99.21	2.16	+1.38
Corn.....	127.95	3.25	+5.91
Sorghum.....	108.03	4.90 4/	+3.09
Broilers 7/.....	1351.64	--	-.44
EC IMPORT LEVIES			
Wheat 8/.....	90.60	2.45	+2.50
Barley.....	74.75	1.60	+4.40
Corn.....	64.05	1.60	+4.60
Sorghum.....	75.00	1.90	+3.50
Broilers 7/ 9/ 11/.....	177.00	--	+5.00
EC INTERVENTION PRICES 10/			
Common wheat(feed quality)	184.25	5.00	+4.40
Bread wheat (min. quality)10/	200.95	5.45	+4.85
Barley and all			
other feed grains.....	184.25	--	+4.40
Broilers 7/ 9/.....	1226.00	--	+7.00
EC EXPORT RESTITUTIONS (subsidies)			
Wheat	42.25	1.15	--
Barley.....	41.00	.89	-.45
Broilers 7/ 9/ 11/.....	139.00	--	+3.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category--70 percent whole chicken. 8/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Reference price. 11/Reflects exchange rate change and not level set by EC. 12/ April-May shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis March delivery.

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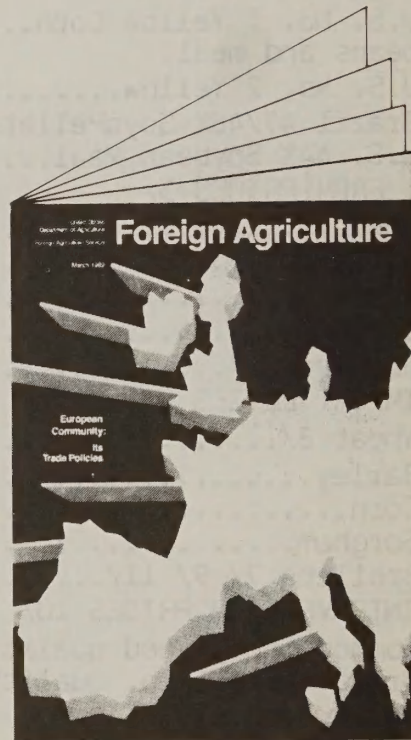
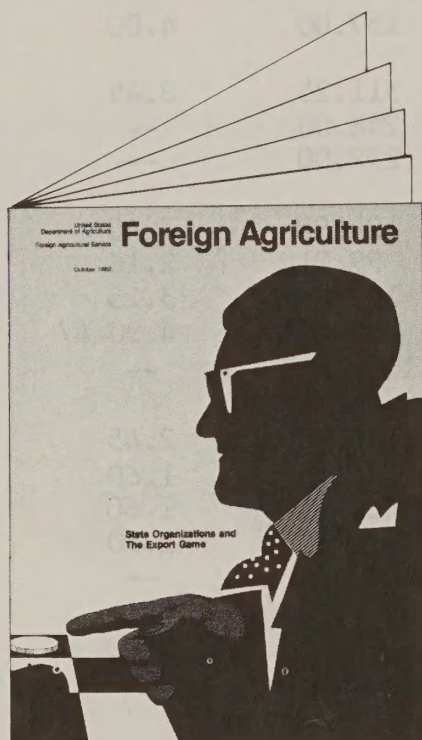
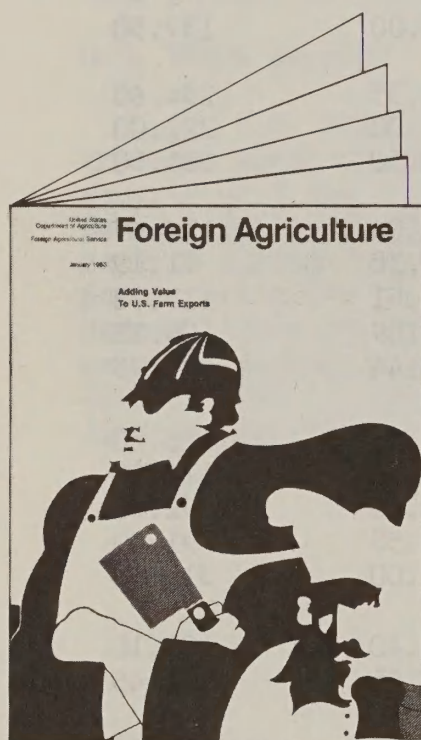
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